Using Report Views to Enhance Scheduling Capabilities

When setting up a run schedule for an IBIS report you can only choose one set of prompt values. However, you may want to run the report multiple times using a different set of prompt values for each run. One solution to this problem is to make a copy of the report with a different name and then this report can be scheduled with the different prompt values you desire. You can repeat this process until you have several reports running each with their own set of prompt values. The problem with this is if you decide you want to change the report you are then forced to make the same changes to all of the copies of the report. A solution to this is to use the report view functionality that is provided with the Cognos software. Using this method, you set up a master version of the report and then instead of making copies of the report you make one or more views of it. These views can then be scheduled to run with whatever prompt values you wish but the advantage of using them over a copy is that when a change is made to the master report the views are automatically updated. Thus the change only needs to be made in one place.

Follow the steps below to set up a report view.

1.   Create master report.
2.   Once the master report is created exit the report and go to the folder where the report has been saved. Click the icon which says "Create a report view of this report".

	Name ⬍	Modified ⬍	Actions
☐ 📄▶	Expenditures by Fund	November 3, 2008 7:46:23 PM	🖼 ▶ 📊 ⊞ 📋 More...

Entries: 1 – 1

Click to create a report view

3. Name the view and choose the location where you would like it to be saved. It can be kept in the same folder as the master or saved to a different folder. Then click Finish.

Specify a name and description - New Report View wizard

Specify a name and location for this entry. You can also specify a description and screen tip.

Name:

Report View of Expenditures by Fund - View 01

Description:

Screen tip:

Location:
My Folders > View Example
Select another location...   Select My Folders

[Cancel]   [< Back]   [Next >]   [Finish]

4. Repeat steps 2 and 3 to create as many views as you will need. Remember each view can be scheduled with a single set of prompt values.
5. Click on the Schedule icon for Report View 01.

Entries: 1 – 3

	Name ⬦	Modified ⬦	Actions
Expenditures by Fund		November 3, 2008 7:46:23 PM	More...
Report View of Expenditures by Fund - View 01		November 3, 2008 7:51:26 PM	More...
Report View of Expenditures by Fund - View 02		November 3, 2008 7:51:55 PM	

Click to schedule a report

6.   Set the day(s) and the time you would like the Report View 01 to run. You can also choose to override the default values for Format and Delivery if you would like to render the report in Excel or PDF and/or you would like to e-mail the report.

7.   Next, check the box in front of Override the default values in the Prompt Values section of the screen.

8.   This will bring up a "Set" link. Click that link to pull up the prompt page for the report.

The prompt values for this report happen to be Agency and Fiscal Year. Specify the values you wish for this view and click Finish.

Expenditures by Fund

Select an Agency and a Fiscal Year

Agency

```
103 - JNT FINANCE APPROPRIATIONS - SEE AGENCY
110 - JUDICIAL BRANCH
120 - LIEUTENANT GOVERNOR
130 - SECRETARY OF STATE
131 - COMM ON UNIFORM STATE LAWS
132 - COMMISSION ON THE ARTS - SEE A196
133 - CODE COMMISSION
140 - STATE CONTROLLER
142 - PAYROLL CONTROL AGENCY
150 - STATE TREASURER
152 - STATE TREASURER CONTROL
```

Fiscal Year

```
2005
2006
2007
2008
2009
```

Cancel   < Back   Next >   Finish

Repeat steps 5 through 8 for the next view of the report. A different set of prompt values can be chosen for this view.

Expenditures by Fund

Select an Agency and a Fiscal Year

Agency

```
200 - DEPT OF ADMINISTRATION
201 - PERSONNEL COMMISSION - SEE 194
210 - DEPARTMENT OF AGRICULTURE
220 - DEPARTMENT OF COMMERCE
230 - DEPARTMENT OF CORRECTION
231 - CORRECTIONAL INDUSTRIES
240 - DEPARTMENT OF LABOR
245 - DEPARTMENT OF ENVIRONMENTAL QUALITY
250 - DEPARTMENT OF FINANCE
260 - DEPARTMENT OF FISH & GAME
270 - DEPT OF HEALTH & WELFARE
```

Fiscal Year

```
2005
2006
2007
2008
2009
```

Cancel   < Back   Next >   Finish

9.   If you would like to e-mail the report, check the box in front of Override the default values in the Options section of the screen.

Schedule - Report View of Expenditures by Fund - View 01

Schedule this entry to run at a recurring date and time. You can run using the default values or specify the options. You can disable the schedule

☐ Disable the schedule

Priority:
3 ▼

Frequency:
Select the frequency by clicking on a link.

By Day   ˅ **By Week**   By Month   By Year   By Trigger

Every 1   week(s) on:
☐ Monday   ☑ Tuesday   ☐ Wednesday   ☐ Thursday
☐ Friday   ☐ Saturday   ☐ Sunday

Start:
Dec 16, 2008   ▦▾
2 : 51   PM ⏶⏷

End:
◉ No end date
○ End by:
Dec 16, 2008   ▦▾
2 : 51   PM ⏶⏷

Options   To set E-Mail options
☐ Override the default values

Formats:
Default

Languages:
Default

Delivery:
Save the report

Prompt values

☑ Override the default values
AGENCY CODE: '150 - STATE TREASURER'. FISC...   View all
Edit...   Clear

10. In the delivery section of the screen put a check in front of Send a link to the report by e-mail. The click Edit the options.

Delivery:
Select at least one delivery method. For burst reports, the email recipients are dete
burst specification.
☐ Save the report
☐ Save to the file system   Edit the options...
    Name: Use the report name. Location: Default. Replace existing files
☐ Print the report
Printer location:
[   ]   Select a printer...
☑ Send a link to the report by email   Edit the options...
    GREGORY SCHENK-140

11. Enter the e-mail options separated by semi-colons and make sure to check the box in front of Attach the report at the bottom.

Set the email options – Report View of Expenditures by Fund – View 01

Specify the recipients and contents of the email. To add recipients, click Select the recipients or type the email address
Body box empty and select the report as the only attachment.

To:
[jdoe@sco.idaho.gov;   ]
Cc:
[   ]
                          Select the recipients...   Show Bcc

Subject:
[Report: Report View of Expenditures by Fund – View 01   ]

Body: Change to plain text »   B *I* U   ≡ ≡ ≡ ≡   ⅷ ⅷ ⅷ ⅷ   ⊞ ₐᵇ
[   ]

☑ Attach the report

[OK] [Cancel]